DoD Integrated Program Management
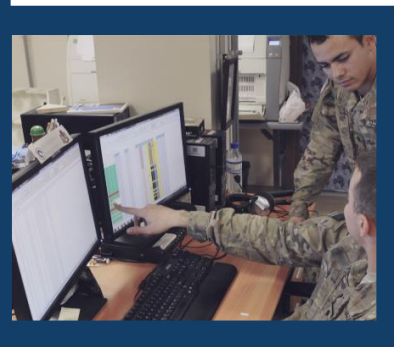
IPMDAR and EVM-CR Updates

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EVM Practitioners Forum
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IPMDAR and the EVM-CR

- Reporting Requirements
- EVM-CR Overview
- Incremental Delivery
- EVM-CR Workflow/File Tagging
- Validation Rules
- Demo

IPMR

- All UNCLASSIFIED ACAT I Programs required to submit to the EVM-CR

IPMDAR

- All UNCLASSIFIED Programs, regardless of ACAT level, required to submit to the EVM-CR

IPMDAR DID Reference

1.5   Data Repository. The Office of the Under Secretary of Defense (OUSD) Acquisition, Analytics and Policy (AAP) Earned Value Management (EVM) Division maintains a secure website, the Earned Value Management Central Repository (EVM-CR)[2], for all unclassified, proprietary and non-proprietary data from programs and contracts that have EVM reporting requirements, regardless of a program's Acquisition Category (ACAT) designation or a contract's value. The EVM-CR is housed on an unclassified computer system designed to control sensitive and proprietary contractor data. The system will accept only unclassified data including contracts with EVM data that are marked as For Official Use Only (FOUO), Business Sensitive, and/or Proprietary. No classified material shall be provided to the EVM-CR. Refer to DoD Manual 5200.01 Volume 4 for information regarding designation and marking of Controlled Unclassified Information (CUI).

5000.85 Major Capability Acquisition (MCA) Pathway

- All Programs required to submit to the EVM-CR

EVMS Reporting Requirements »			+
CONTRACT VALUE	**APPLICABILITY**	**NOTES**	**SOURCE**
< $20M	Not required	IPMDAR may be used if cost and/or schedule reporting is requested by the program management office	Integrated Program Management Data and Analysis Report (IPMDAR) DID DI-MGMT-81861B*
≥ $20M & < $100M	Required monthly when EVMS requirement is on contract	All IPMDAR datasets/ files must be included in the CDRL. Tailoring in accordance with DI-MGMT-81861B and Implementation Guide is allowed.	Integrated Program Management Data and Analysis Report (IPMDAR) DID DI-MGMT-81861B*
≥ $100M	Required monthly when EVMS requirement is on contract	IPMDAR is required. All files are required.	Integrated Program Management Data and Analysis Report (IPMDAR) DID DI-MGMT-81861B*

Table Notes:

All contracts, task orders, and delivery orders; IPMDAR data will be delivered to the EVMS Central Repository.

The IPMDAR can be tailored to collect cost and/or schedule data for any contract regardless of whether EVMS is required. For information on tailoring the IPMDAR, refer to the DoD IPMDAR Implementation Guide.

Formats and reporting requirements for the IPMDAR are determined and managed by the OUSD(A&S) Acquisition Data and Analytics.

For more information regarding the IPMDAR DID and Implementation Guide, or the EVM Central Repository, visit the OUSD(A&S) Acquisition Data and Analytics / Integrated Program Management website.

Reporting thresholds are in then-year dollars.

* DI-MGMT-81861B = Data Item Management-81861

DAU website: https://www.dau.edu/aafdid/Pages/EVMS-Reporting-Requirements.aspx

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- *The EVM-CR is a data repository managed by the IPM division of OUSD(A&S) ADA, the office of Acquisition Data and Analytics.*

- *The purpose of the EVM-CR is to establish a source of authoritative Earned Value Management (EVM) and Integrated Program Management (IPM) data for the Department and to provide prompt access for PMOs, Services, OSD, and DoD Components.*

SUBMIT
- Industry
- Monthly reports delivered direct from the supplier

REVIEW
- Government
- Gov't PMO reviews and approves or rejects delivery

PUBLISH
- Published submissions are available to all approved DoD Analysts

IPMDAR doesn't change this process

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140 Programs

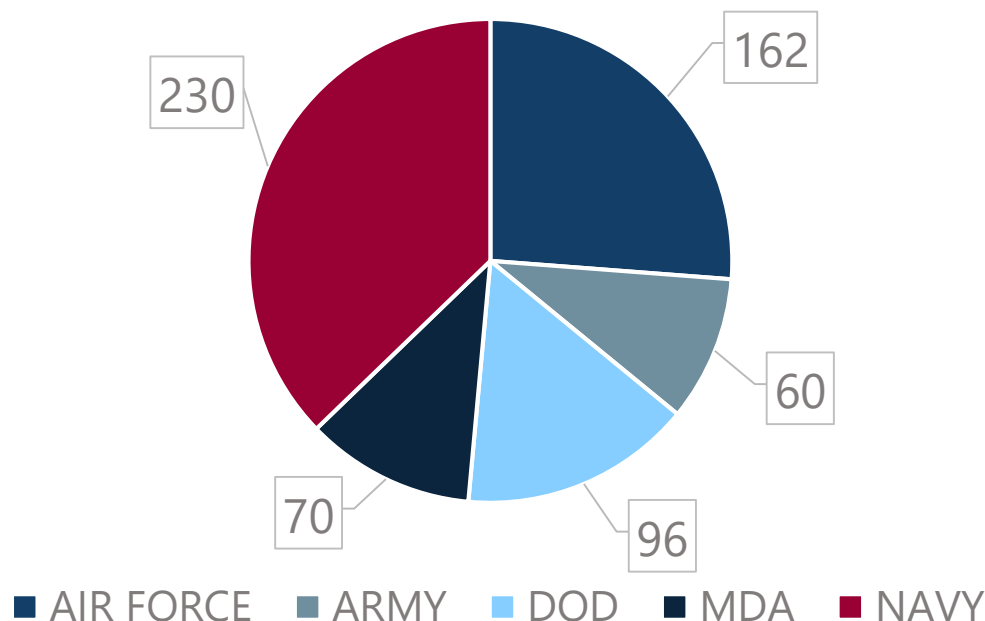- ACAT I – 126
- ACAT II – 9
- ACAT III – 5

387 Contracts

618 Efforts

- Each contract can have multiple monthly IPMDAR/IPMR reporting requirements
  - Delivery Orders
  - Task Orders
  - CLINs

Efforts by Service
As of 10/4/2021

■ AIR FORCE	■ ARMY	■ DOD	■ MDA	■ NAVY

162
230
60
70
96

Access Requirements & User Roles

ADA·IPM

Access request via ADA IPM public website: https://www.acq.osd.mil/asda/ae/ada/ipm/

ACQUISITION
Office of the Assistant Secretary of Defense

Home   Policy & Guidance ▾   About IPM ▾   Training ▾   EVM-CR ▾   Contact IPM ▾   ASD(A) ☰   🔍

ADA · Integrated Program Management   EVM-CR   🔒 Log In   Request Account   How to Register

Industry

Submitter

RESPONSIBLE FOR
Delivery of reports

APPROPRIATE FOR
Industry contractors

Industry Reviewer

RESPONSIBLE FOR
Oversight of reports delivered by all submitters from their organization

APPROPRIATE FOR
Industry contractors

Government

Reviewer

RESPONSIBLE FOR
Reviewing, approving, and publishing reports

Managing submitters and reviewers assigned to efforts

APPROPRIATE FOR
Program Office

Analyst

ALLOWED TO
View and download published reports

APPROPRIATE FOR
DoD

ACCESS EVM-CR via

• External Certification Authority (**ECA**) certificate

• Certificates issued by major contractors Boeing, Northrup Grumman, Raytheon, and Lockheed Martin

ACCESS EVM-CR via

• Common Access Card (**CAC**)

• NDAs: Support contractors must obtain and submit NDAs in order to gain reviewer or analyst permissions

IPMDAR DID Reference

> 1.2 The IPMDAR consists of the following three components:
>
> 1.2.1 Contract Performance Dataset (CPD). Provides performance/execution data from the contractor's existing management systems.
>
> 1.2.2 Schedule (Comprised of both the Native Schedule File and the Schedule Performance Dataset (SPD)). Provides data from the contractor's Integrated Master Schedule (IMS).
>
> 1.2.3 Performance Narrative Report (Comprised of both the Executive Summary and the Detailed Analysis Report). Provides narrative analysis of data provided in the CPD and the Schedule.

IPMR vs. IPMDAR

IPMR	IPMDAR
Formats 1-4 and 7 (UN/CEFACT)	CPD - Contract Performance Dataset (JSON)
Format 6 (UN/CEFACT)	SPD – Schedule Performance Dataset (JSON)
Format 5	Performance Narrative • Executive Summary • Detailed Analysis Report
Formats 1-4 (Human Readable)	*** Not Required ***

Executive Summary

- A program and contract overview containing the following:
    - Top level PM cost and schedule forecast
    - High level variance summary
    - Undistributed Budget (UB) and Management Reserve (MR) Analysis

Detailed Analysis

- A compilation of write ups to describe the variances within a certain scope of the contract at the control account level.

Performance Narrative is to be delivered in a human readable format (PDF, Word, etc.)

IPMR

- 12 – 17 Days after the close of the contractors accounting period

IPMDAR

- Monthly deliveries must be delivered to the EVM-CR NLT 16 days after the close of the contractors accounting period.

IPMDAR DID Reference

1.8	Delivery Timing.
1.8.1	Monthly Submission Requirement. IPMDAR data shall be required at least monthly. The reporting frequency shall be specified in the Contract Data Requirements List (CDRL). All reports shall reflect data from the same accounting period and shall be provided at any time after the close of the contractor's accounting period, but no later than sixteen (16) business days after the contractor's accounting period end date.

IPMDAR DID Reference

1.8.1.1 Incremental Delivery. Reports may be provided incrementally, including preliminary data, with the number of days for delivery of each submittal tailored in the CDRL. Data delivered is not considered authoritative until the final submission and signature. The recommended incremental delivery process is the Schedule, followed by the CPD and the Executive Summary, Government review of submittals, Government directed Detailed Analysis, Contractor Detailed Analysis delivery and all final data.[5]

IPMDAR Implementation & Tailoring Guide - Example

For notional and guidance purposes the incremental delivery plan could be constructed as follows:

1. SPD – To be delivered with native file five (5) working days after the end of the contractor's accounting period (may be labeled preliminary)
2. CPD – To be delivered with the Executive Summary ten (10) working days after the end of the contractor's accounting period (may be labeled preliminary)
3. Contracting Office to select items for detailed analysis (variances) – to contractor thirteen (13) working days after the end of the contractor's accounting period
4. Performance Narrative Analysis – to be delivered NLT sixteen (16) working days after the end of the contractor's accounting period along with any other "final" versions of previously submitted files

Note: The notional incremental delivery plan above is not additive.

IPMDAR CDRL Tailoring Options

- Level of Reporting (Control Account, Work Package, WBS)

- Units (Dollars, Hours or Both)

- Frequency (Monthly, Quarterly, Annually, Incremental or Upon Request)

- Variance Analysis Options (Government Identified Variances, Government Specified Variance Thresholds, Specific Number of Variances)

- Tailoring out "formats" (e.g. Schedule only deliverable)

- Eliminate Performance Narrative Report and use Internally Generated Contractor Explanations or Performance Reviews

- Eliminate SPD and receive Native Format Schedule only.

Additional Tailoring Options discussed in the IPMDAR Implementation & Tailoring Guide available on the IPM Public website

CDRLs Determine Reporting Requirements

- IPMDAR DID is put on contracts
- CDRL sent to EVM-CR Admins
- Admins establish Reporting Stream based on CDRL requirements
- EVM-CR measures reporting compliance against CDRL requirements (Compliance Reports sent to Services, Components and Industry focal points)

Selected DID: **IPMDAR**   IPMR   CPR/IMS

Cost	Submit Days	Submit Day Type	Frequency
Contract Performance Dataset	16	Business	Monthly

Schedule	Submit Days	Submit Day Type	Frequency
Schedule Performance Dataset	16	Business	Monthly

Reporting Stream reflects CDRL Requirements

Submitter (Industry)

Request Access to Contract
- Request Access, Gov't Approves
- Contract Help Desk if needed
- Review Reporting Stream

Upload Deliverables
- Select Effort
- Upload Required Deliverables
- Review for Data Quality
- Communicate as needed with Review Team

Reviewer (Gov't)

Request Contract Add
- Provide Contract Detail Info
- Provide CDRLs (DD-1423)
- Review Reporting Stream

Manage Users Assigned
- Approve Review Team
- Approve Submit Team

Approve/Reject Submissions
- Data Quality Review
- Compliance Review
- Communicate with Submit team as needed

Contact Help Desk for Assistance EVM-CRSupport@Tecolote.com

Upload Submission

- Requirements populated based on defined Reporting Stream
- Submission in Open Status allows both Industry and gov't access concurrently
- Submit when all requirements are uploaded

Cost / Schedule Submission
CFSR Submission

Reporting Requirements		
File Type	**Upload**	**Included**
Electronic Cost (IPMR)	⬆	✖
Electronic Schedule (Format 6)	⬆	✖
Human Readable Cost	⬆	✖
Native Schedule	⬆	✖
Format 7	⬆	✖
Other	⬆	

System provides Real Time Feedback of Uploaded Requirements

Machine Readable Files

- JSON and UN/CEFACT files (IPMDAR CPD, SPD and IPMR Formats 1-4, 6 and 7) are read by the system and the appropriate file type will be assigned.

Human Readable Files

- File type of PDF, Word, XLS, PPT, and Native Schedule files must be identified by submitter to receive credit for delivery

Upload File ✕

○ Native Schedule

○ Other/Human Readable
☐ Cost
☐ Format 5
☐ Executive Summary
☐ Variance Analysis
☐ Signature Page

Component

[⌄]

Add a comment

[   ]

Submit

Review Data Quality Validation Report

- Display of all checks run on the file with an indication of pass/fail
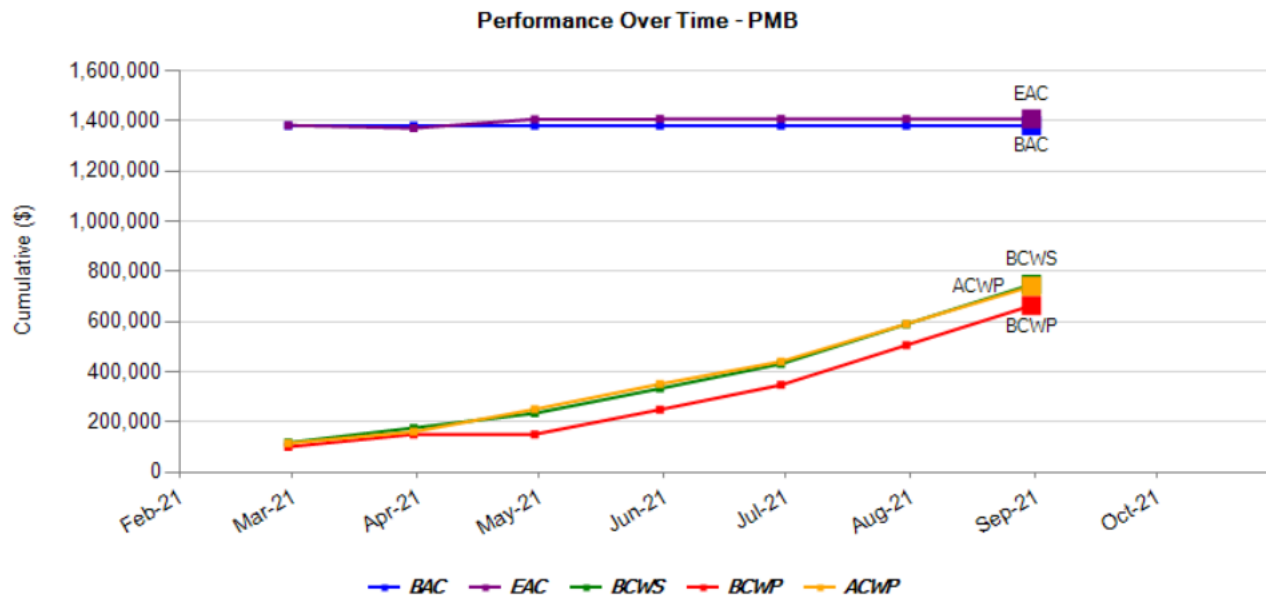
Review Performance Over Time Chart

- 5 Key EVM Metrics charted over the life of the effort. Includes indicator of where data in submitted file falls in relation to previous submissions.

Quick Links

🔍 Data Quality Validation
🔍 Performance Over Time

Spikes or dips could indicate a Data Quality Issue

Performance Over Time - PMB

Open

- Submission is in Submitter control, but Review team can access files and make comments

Pending

- Submitter has submitted required files, Review team has **5 days to review** (optionally can extend to a maximum of 10 days if needed)

Published

- Review team has completed their review and Lead Reviewer has Published the submission or review period has expired and submission has auto-published. All approved government Analysts now have access.

Rejected

- Review team has rejected submission. Submitters and Reviewers assigned to the contract will still have access to the submission. Government Analysts will not.

IPMDAR Export Options

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XLS Export
- Provides a tabular view of JSON Tables and Data

CSV Export
- Provides JSON data export in a pivotable table

XML Export
- Generates an IPMR UN/CEFACT file from the provided JSON

Submission Files
Cost

	File Name				Report Type
	CPD Sample File.zip	XLS	CSV	XML	Electronic Cost

Downloadable Tools

- **Validation Tools** – validate CPD & SPD files against the Data Exchange Instructions (DEI)

- **Conversion Tools** – convert the CPD & SPD files into legacy IPMR formats

Where can I get these?

- Available for download from the IPM Public Website

NOTE: Government firewalls may block these tools from being downloaded.

Web Based Conversion Tools

- **CPD Conversion Tool** – converts the CPD file to a legacy IPMR UN/CEFACT file

- **SPD Conversion Tool** – converts the SPD file to a legacy IPMR Format 6 file

NOTE: Users must have an approved EVM-CR account to access the web based tools.

IPM Public Website:
https://www.acq.osd.mil/asda/ae/ada/ipm/

Reminders

- Do not require delivery of legacy IPMR or CPR Formats (UN/CEFACT, human readable formats 1 – 4* or legacy wInsight)

- Do not tailor out IPMR "Formats" (Format 1 – 4)

- Do not require a specific due date, such as delivery is required on the 25th of each month

Excludes Performance Narrative, which is in human-readable contractor format

Recommendations

- Discuss with contractor definition of "Business Days"
  - NLT 16 GOVERNMENT Business Days after the end of the contractors accounting period.

Acronyms

- **CPD** – Contract Performance Dataset

- **DEI** – Data Exchange Instructions

- **DID** – Data Item Description

- **EVM-CR** – Earned Value Management Central Repository

- **FFS** – File Format Specification

- **IPMDAR** – Integrated Program Management Data and Analysis Report

- **IPMR** – Integrated Program Management Report

- **SPD** - Schedule Performance Dataset

References

- DEI & FFS
  https://www.acq.osd.mil/asda/ae/ada/ipm/policy-guidance.html#ipmdar-dei-ffs

- DID
  https://quicksearch.dla.mil/qsDocDetails.aspx?ident_number=278901

- Implementation & Tailoring Guide
  https://www.acq.osd.mil/asda/ae/ada/ipm/docs/IPMDAR%20Implementation%20and%20Tailoring%20Guide_Stamped.pdf

- Desktop Tools
  https://www.acq.osd.mil/asda/ae/ada/ipm/resources.html

Any Questions?

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